

# Diversity, Equity & Inclusion Strategy & Education Development Proposal

*October 2020*



## Executive Summary

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The Winters Group, Inc., a 36-year-old global diversity, equity, and Inclusion consulting firm will partner with your organization on a three-step strategic intervention project:

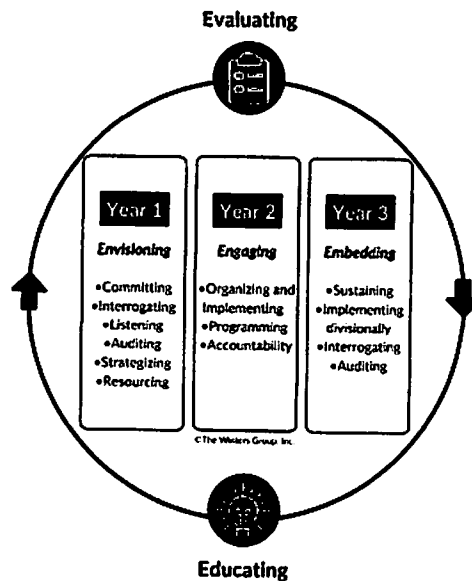
- 1) Leadership / DEI Guide Team cultural competency assessment and education session that includes one-on-one coaching.
- 2) Key manager and staff cultural competency assessment and education.
- 3) Leadership / DEI Guide Team strategy development session to identify quick wins (high impact – low effort actions) and prioritize significant projects (high impact – high effort actions).

## Approach and Scope of Work

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### I. Develop a Sustainable Diversity, Equity and Inclusion (DEI) Strategy

In general, the Winters Group recommends a three-year planning process and framework, as shown in the model below. We modify this approach based on the needs of each client.



#### *Step 1: Strategic Planning Engagement, or Strategic Intervention Project*

Our partnership's first step is determining whether we are beginning or accelerating a strategic planning engagement or initiating a strategic intervention project.

- As stated above, a **strategic planning engagement** is typically three years in duration and includes all five segments of the planning process. The engagement includes working with executive leadership to develop a DEI vision, mission, metrics, current, and future state, and dashboard to evaluating performance against those key metrics. The Winters Group can serve as either a virtual Chief Diversity Officer, project manager, or coach to the organization throughout the process. If you already have a DEI strategy, we customize our products and services to align with your approach. An engagement manager, who has CDO experience, will be assigned to assist you. A strategic planning engagement usually includes the following components:

1. Leadership / Stakeholder cultural competency education and direction setting (i.e., IDI assessment, one-on-one coaching session, group IDI profile discussion and engagement planning)
  2. Comprehensive Cultural Audit (i.e., company-wide IDI assessment, key stakeholder interviews, reviewing of existing systems and process data, Inclusion Insights Survey™, and comprehensive report of findings.)
  3. DEI strategy development session, e.g., development of culture state, future state, strategies, tactics, KPIs and progress dashboard
  4. DEI education to support strategy implementation
  5. Development of marketing and communications plan to inform and engage stakeholders
  6. Review organizational systems and process maps (e.g., analysis of the talent management systems, procurement management systems, social responsibility systems, account management systems.) to identify changes.
  7. Incorporation of accountability systems to reinforce changes
  8. Implementation of other systems and process mapping recommendations to embed changes
  9. Progress management through the dashboard to demonstrate sustainability
  10. Re-evaluation against cultural audit baseline data to confirm progress
  11. Revise DEI strategy and any systems changes to accelerate progress
  12. Document successes and close-out engagement
- **A strategic intervention project** is focused on one or more segments of the planning process. Projects can range from a cultural audit, to focus groups, to systems analysis to marketing and communications to education. An intervention project is best suited for an organization responding to an urgent need and has developed or intends to develop a DEI strategic plan. We have found that DEI interventions that are not aligned to business strategy do not have a sustainable and long-term impact. A project manager, who is experienced in the segment process, manages the project. A strategic intervention project might include the following steps:
    1. Leadership / DEI Guide Team cultural competency assessment and education session that includes one-on-one coaching,
    2. Key manager and staff cultural competency assessment and education, and
    3. Leadership / DEI Guide Team strategy development session to quick wins (high impact – low effort actions) and prioritize significant projects (high impact – high effort actions).

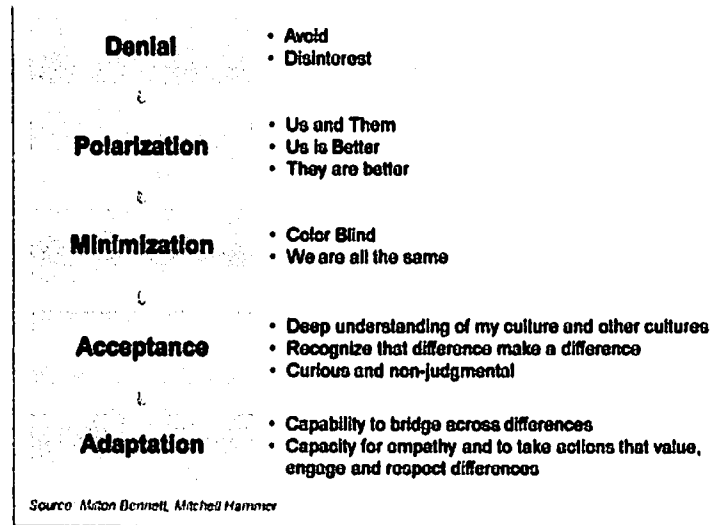
A strategic intervention project is an excellent approach to gain insight and implement tangible action in the short-term.

### ***Step 2: The Intercultural Development Inventory® (IDI)***

Both a strategic planning engagement and intervention project include the use of the Intercultural Development Inventory. We recommend administering the IDI in advance of any learning experience. The IDI is a measure of the organization's capability to adapt effectively to cultural commonalities and differences. Most assessments focus on perceptions and opinions. Assessing perceptions and attitudes is undoubtedly an important component; however, the information gleaned from that approach alone will not reveal how competent the organization or group is to address the identified barriers and gaps. The IDI results are predictive of how well the organization or group can achieve its stated goals. The IDI will also help us to determine readiness.

Developed by Dr. Mitchell Hammer and Dr. Milton Bennett, the IDI is a 50-item, theory-based online instrument that measures intercultural sensitivity as conceptualized in Bennett's Developmental Model of Intercultural Sensitivity (DMIS). The DMIS is a framework for explaining the reactions of people to cultural differences. The model's underlying assumption is that as one's experience of cultural differences becomes more complex, one's potential competence in intercultural interactions increases.

Dr. Bennett has identified a set of fundamental cognitive structures (or "worldviews") that act as orientations to cultural difference. The worldviews (*see diagram*) vary from more ethnocentric to more ethnorelative. According to the DMIS theory, more ethnorelative worldviews can generate the attitudes, knowledge, and behavior that constitute intercultural competence, and ultimately inclusive behaviors.



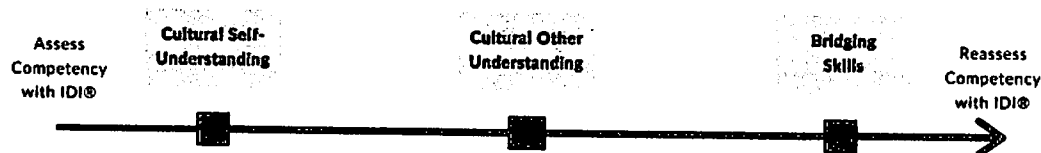
Following the IDI administration, participants will have the opportunity to review their results and develop an Individual Development Plan (IDP) with a Winters Group IDI Qualified Administrator via phone. The IDI will provide an additional layer of self-understanding for participants. The educational session includes the aggregate results for those who take the IDI. After the initial education session, The Winters Group will develop a learning plan.

## II. Your Strategic Intervention

### *Cultural Competency Assessment, Education and Strategy Sessions*

As mentioned, a strategic intervention project is focused on raising DEI awareness, obtaining some organizational feedback, and beginning planning within a three-to-five-month timeframe.

The Winters Group's education philosophy is to meet people where they are, take a developmental approach, and educate rather than train. Training efforts are typically designed as one-time events focusing on tolerance and sensitivity — and perhaps a small amount of skill-building. Education is developmental, ongoing, and focuses on competency-building through practice, reflection, and intentionality.



### *Custom Design*

The Winters Group experiences are customized, experiential, and research based. Through consultation meetings with our Learning & Innovation Team and assigned facilitator, The Winters Group will customize content for the client based on desired goals/outcomes, participant demographic, organizational culture, and client-specific experiences and terminology.

As part of the custom design process, The Winters Group will review your organization's employee survey and incorporate specific examples and scenarios that are relevant to your employee experiences into the session. Each session is designed to leave participants with skills, tools, and strategies to apply in behaviors and interactions immediately.

The custom design process takes, at minimum, five weeks.

### **Delivery**

Now more than ever before, leaders and employees alike must have the skills and competencies to engage in dialogue on historically, polarizing, and "off-limits" topics. The old adage that made these topics taboo in the workplace no longer applies in today's volatile socio-political climate. Whether leaders like it or not, employees are talking about and thinking about the day's issues, and such topics impact employees' level of productivity, engagement, and psychological safety. During polarizing times, in particular, employees tend to bring stress and identity-based trauma associated with the workplace's socio-political climate. It is essential to provide leaders with opportunities to enhance their awareness and capability to effectively create inclusive environments.

### **Leadership Cultural Competency Assessment, Education and Strategy Sessions – Parts 1 and 2**

Part 1: Orcas Island School District Steering Committee and Equity Group [14 participants] (2.5 to 3 hours)  
This session's core content will be the Intercultural Development Inventory (IDI) assessment of the organization's leaders and the DEI guide team. Results from any existing employee survey will be incorporated into the session. Crucial components of this session include:

- Introduce cultural competence and review IDI Group profile
  1. Definitions (diversity, equity, Inclusion, culture, prejudice, discrimination, racism, and systemic racism, etc.)
  2. Group IDI profile
  3. Introduce model and tools to enhance individual and group cultural competence
- Incorporate any existing employee survey information
- Determine the next steps regarding the development of the firm's DEI strategy

Part 2: Orcas Island School District Steering Committee and Equity Group [14 participants] (3 to 4 hours)  
The core content for this session will be the results from any existing employee survey, as well as the evaluation survey from the leadership and staff education sessions, and includes:

- Review educational session evaluations to incorporate that feedback into DEI planning
- Complete Impact-Effort matrix of employee survey and other recommendations to determine quick wins, prioritize major projects, and avoid thankless tasks.
- Develop project charters for highest priority major projects
- Determine next steps

### **Staff Cultural Competency Assessment, Education**

Orcas Island School District Staff Session [~100 participants] (90 minutes – 2 hours)  
This session includes content from the leadership education, so that leadership and staff are operating with the same definitions, models, and concepts. For the session evaluation, the following questions will be added

1. Ask employees if the company values match what they see in our firm
2. Collect a series of action items to be executed through action planning
3. Offer ways we can celebrate accomplishments, initiatives, and progress

Investment

Service	Fees*	Cost Estimate
Ad-hoc Consulting Hours	\$150/per-hour	6 * 150 = 900
Leadership and DEI Guide Team Intercultural Development Inventory (IDI) Assessment <ul style="list-style-type: none"> <li>Includes administration, analysis, reporting</li> <li>1x1 feedback to review individual results and personalized Individual Development Plan (Note: individuals are unable to receive their results without 1-1 feedback)</li> </ul>	\$150/ per person receiving assessment & one-on-one session  \$25/ per person receiving assessment without one-one-one session	14 * \$150= \$2,100  January (June) 2021 Steering Committee and Equity Committee Part 1: One Session \$3,000
Customized Design & Delivery of Sessions <ul style="list-style-type: none"> <li>Exact modules, number of sessions and dates TBD</li> <li>Includes prep meetings, tech checks, etc.</li> </ul>	1-hour to a 75-minute session Design: \$1,000/module Delivery: \$2,000/session  75-minute to 2.5-hour session Design: \$1,500/module Delivery: \$3,000/session  2.5-hour to 4-hour session Design: \$2,000/module Delivery: \$4,000/session  Full-day session Design: \$2,500/module Delivery: \$5,000	Steering Committee and Equity Committee Part 2: One Session - \$3,000  August (June) Staff Part 1: \$3,000
<b>Total Investment*</b>		<b>\$12,000</b>

\*Budget Notes:

1. This price quote is valid for 60 days from date of this Statement of Work.
2. Pricing is estimated. Any material change in scope will result in budget modifications.
3. Out of pocket expenses for travel and related expenses will be billed at cost. It is anticipated that all sessions will be delivered virtually.
4. **Payment Schedule:** Half of project fees due upon project initiation, full balance due upon successful completion of work performed. The Winters Group's payment terms are NET 30 from receipt of invoice.
5. **Cancellation Policy:** If the client notifies The Winters Group of the need to cancel the project at any time, client will pay any applicable project fees incurred up until the point of cancellation/termination.

If the client notifies The Winters Group of the need to cancel a scheduled project event one (1) to fourteen (14) business days prior to the applicable project event date, the client will be required to pay fifty percent (50%) of the applicable project event fee plus any non-refundable/non-cancelable travel expenses The Winters Group incurred in connection with the project event described herein.

If the client notifies The Winters Group of the need to postpone a scheduled project event one (1) to fourteen (14) business days prior to the applicable project event date, the client will be required to pay twenty-five percent (25%) of the applicable project event fee plus any non-refundable/non-cancelable travel expenses The Winters Group incurred in connection with the project event described herein.

If The Winters Group notifies the client of a need to cancel a scheduled project event at any time, The Winters Group will be required to pay for any non-refundable/non-cancelable travel expenses the client incurred on behalf of The Winters Group in connection with the engagement.

**Other Notes:**

- The Winters Group maintains sole ownership of copyrights and intellectual property included in deliverable(s).
- The Winters Group does not share slides. Resources or key takeaways may be shared as part of the engagement.
- All contracting must be finalized (i.e. signed SOW/contract, MSA), including vendor set-up, before we can begin work.
- Any recording of sessions must be agreed to in advance and may result in additional fees.

Agreed to by:

For **The Winters Group, Inc.**

Sign: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

For *Orcas Island School District*

Sign: *[Signature]*  
Name: *Eric Webb*  
Title: *Superintendent*  
Date: *11-30-20*